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ABSTRACT

This publication updates four earlier ones having similar titles, the last of which was written in 1979. These guidelines are intended to aid local school districts in Oregon in developing their own staff evaluation procedures and documents. The guide begins by citing the six administrative agencies outside the district that regulate most school district personnel matters, followed by elements of supervision and evaluation that apply to both certificated and classified employees. The major part of the document applies only to certificated employees; only three pages apply to classified employees. A list, for both teachers and administrators, of suggested standards for competent and ethical educators is accompanied by samples of the kinds of statements a district may want to develop as indicators of performance. Suggested schedules of evaluation activities include a flow chart showing the sequence of events and the alternative steps that may be taken in the certificated staff evaluation process. The guidelines conclude with a suggested checklist for reviewing the personnel evaluation process and sample forms for employee evaluations, proposed policy resolutions, job description and employee standards, teacher evaluations, personnel progress and performance evaluation, and plan of assistance. (MLF)

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EVALUATION GUIDELINES FOR SCHOOL PERSONNEL

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May 1986

Oregon Department of Education
Salem, Oregon 97310-0290

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FOREWORD

This publication updates earlier documents designed to help local school districts deal fairly with all employees.

Districts should carefully and annually review their personnel policies. Evaluation procedures developed locally should include both certificated and classified employees. Evaluation programs should emphasize the goal of improved learning experiences for students and performance by staff members.

Questions or suggestions regarding this publication should be addressed to Milt Baum, Associate Superintendent for School District Services, 378-4772, or George Martin, staff assistant, 373-7172.

Verne A. Duncan
State Superintendent of
Public Instruction

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BASIC PRINCIPLES

The evaluation of school district personnel is based upon the Oregon statutes, state rules, the findings of the courts, the Public Employes Relations Board, the Fair Dismissal Appeals Board and good practice.

It is extremely important to recognize and apply the following:

1. The fundamental purpose of the school is to aid the learning of Oregon youth. This is accomplished by employing well-prepared teachers and other employees and is further accomplished by providing employees assistance in the performance of their duties.

2. Employees may be assisted in a number of ways. The basic procedure is that of supervision by trained supervisors. Further assistance may be provided by the district and building staff development program.

3. One element in staff development involves the use of such instruments as student tests and other devices designed to evaluate the quality of the performance of employees. The process of evaluation that is addressed in this document is outlined in detail to assist districts and building supervisors to carry out staff evaluation as required by Oregon statute and rule.

NOTE: The basic principle is an emphasis on supervision. Evaluation is only a part of the process. Both are designed to help <u>all</u> employees enhance student learning in a safe environment.

INTRODUCTION

Districts should provide for staff improvement to help all employees offer the best possible service. Districts must provide for evaluation to determine teachers' development and growth in the teaching profession and their performance of teaching responsibilities (ORS 342.850 and OAR 581-22-715(1)(D)).

This publication updates four earlier ones having similar titles, and it replaces Evaluation Guidelines for School Personnel, 1979. It deals with ALL district personnel.

Authority

Six administrative agencies outside the district regulate most school district personnel matters: State Board of Education, Teacher Standards and Practices Commission, Fair Dismissal Appeals Board, Employment Relations Board, Bureau of Labor, State Archivist. The courts may get involved.

The State Board of Education regulates through its rules and prescribes a form for teacher evaluation (ORS 342.850).

The Teacher Standards and Practices Commission regulates certification, assignments, and competent and ethical performance of professional duties.

The Fair Dismissal Appeals Board interprets the Fair Dismissal Law (ORS 342.805 to 342.934) and guides districts in dismissal procedures through its orders on appealed cases.

The Employment Relations Board interprets and administers the Collective Bargaining Law (ORS 243.650 to 243.782).

The Bureau of Labor interprets and administers the laws relating to wages, hours, conditions of employment and civil rights.

The State Archivist determines what personnel records must be kept and for how long.

Local school district boards usually regulate matters for teacher evaluation. Boards should consult with administrators and teachers to develop the district evaluation process. It should include job descriptions and performance standards, a preevaluation interview, an evaluation based on written criteria, and a post-evaluation interview.[1] The Teacher Standards and Practices Commission may use violation of its standards for competent and ethical performance

[1]See ORS 342.850(2).

as evidence of gross neglect of duty or gross unfitness.[2] The Oregon Department of Education reviews personnel policies to check for affirmative action and evaluation procedures for all employees.[3] Administrators and staff members develop the district evaluation process.

Implementation

A staff improvement program (OAR 581-22-715) usually includes identification of the work expected of employees (position descriptions), evaluation of employees' performance (for certificated employees, see ORS 342.850), and provisions for inservice or other activities to help employees improve.

Districts looking for help with these tasks may find it here. Districts with well-developed programs may find suggestions for review of their plans and procedures.

Pages 4-5 in this edition apply to both certificated and classified employees. Pages 6-24 apply only to certificated employees. Pages 25-27 apply only to classified employees.

Model Policy

The following model policy is only a SUGGESTION. It could be stated in other ways, but it should provide specifically for both certificated and classified employees. Local district boards should consult with their attorneys before adopting their own language.

[district policy number]	It is the policy of the _____ _____ Board to provide opportunities for staff improvement, including evaluation. Personnel shall participate in programs designed to achieve this policy as provided in ORS 342.850.

[2]See ORS 342.175(5).
[3]See OAR 581-22-715(1)(a)(A) and (D), and (1)(b).

SUPERVISION AND EVALUATION

School districts should emphasize supervision and evaluation as tools for the improvement of performance.

Supervision and evaluation assignments should be made appropriately. Careful consideration should be given to providing enough qualified supervisors to oversee work and to make judgments about the work and the persons doing it. Districts should provide adequate time for persons assigned to supervise and evaluate.

All certificated employees must be supervised and evaluated by another certificated person, except in districts with fewer than 200 students (ORS 342.850(3)). Districts without an administrator may want to have staff of the education service district help with supervision and evaluation. Districts might want to use other options (e.g., contracting with capable persons).

Basic Elements of a Sound Program

The following elements of a district program for supervision and evaluation apply to both certificated and classified employees. Supervision is a constructive plan or program for the improvement of instruction through the cooperative efforts of those involved. Evaluation is the process of ascertaining or judging by careful appraisal the employee performance.

1. Supervision and evaluation should promote personal growth and competent performance which, in turn, should result in the improvement of instructional and educational programs.

2. Supervision and evaluation should include provisions for objective judgment by qualified personnel.

3. Evaluation should be an essential part of staff development and service improvement, and should create a better understanding between employers and employees. Periodic evaluations should help supervisors and employees to identify strengths that should be encouraged or weaknesses that should be corrected. Evaluation may also help supervisors recognize employees' potential for greater responsibilities.

4. Supervisors should be trained in the skills of supervision and evaluation.

5. Employees should know where they stand with respect to job performance. They should receive recognition for outstanding work. They should know how to improve. Evaluation should be fair and conducted in a positive manner.

6. Position descriptions[4] should be prepared for all positions in the district and reviewed at the end of the school year, or as needed. Descriptions should be discussed with new employees at the time of employment. This discussion should include a review of the specific job and the expected performance.

7. Performance evaluations should be based on both the position description, the district-adopted standards of performance and the individual employee goals as developed with the supervisor.

8. Evaluations should be in writing, signed by both the evaluator and the person evaluated. (The signature of the person evaluated usually indicates merely that the evaluation was read. It does not necessarily indicate agreement.) Provisions should be made for the person evaluated to respond to the evaluation report.

9. A cycle of supervision should include cooperative involvement between evaluators and persons to be evaluated regarding:

   a. Understanding procedures and individual performance needs

   b. Establishing specific goals in performance terms

   c. Observing the performance(s)

   d. Obtaining data, including performance results

   e. Analyzing the data

   f. Planning the conference

   g. Conferring

   h. Scheduling additional segments of the cycle (items a-g)

   i. Planning appropriate experiences

   j. Planning a professional growth program

[4]See EMPLOYMENT PROCEDURES: Position Descriptions, Applications, Personnel Files (Salem: Oregon Department of Education, May 1979).

SUGGESTED STANDARDS FOR CERTIFICATED PERSONNEL

Evaluation should be done in terms of the tasks assigned, as provided in position descriptions.[5] Performance should be objectively observable and measurable.

The Evaluation of certificated staff should be carried out on a schedule (see pages 21-23 for suggestions) and otherwise as may be necessary. Districts may want to use the preliminary Personnel Progress and Performance Evaluation on pages 40-45 (it is a sample).

Districts should develop and regularly use written performance standards, with employee and supervisor setting performance goals based on the position description, performance standards, and current needs.

Employees new to districts should set these performance goals before the end of the first month of school. Returning employees should do so at the post-evaluation interview of the previous year [see ORS 342.850(2)(b)(B)], or as otherwise requested. In the event of disagreement, supervisors should establish goals, noting the employee's disagreement, and provide for implementation.

Employee and supervisor should determine if performance goals have been reached at each checkpoint, or as otherwise requested. After reviewing the performance, employee and supervisor should revise or develop new goals. Setting and reviewing performance goals provide the basis for regular evaluations of employee improvement and professional activities.

The Teacher Evaluation on page 38 (it is NOT a sample; it is required[6]) should be prepared for all certificated staff in the district. Probationary employees must be evaluated at least annually, permanent employees at least biennially. Districts may supplement this form with their own forms but must attach the district form(s) to the state form.

Plan of Assistance
(See also page 26)

If an employee's effectiveness is below the performance standards, districts may want to implement a plan of assistance. Such a plan should include an objective analysis of observable difficulties and a statement of immediate goals to overcome these difficulties. The plan should include a checkpoint schedule, and both employee and supervisor should sign it.

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[5] ORS 342.850(2)(b)(A) uses "job description." For an explanation of Department use of these phrases in this PMAC series, see EMPLOYMENT PROCEDURES: Position Descriptions, Applications, Personnel Files (Salem: Oregon Department of Education, May 1979), p. 3.

[6] See ORS 342.850(1) and OAR 581-21-024.

The plan may be reassignment, now or at a later date, to a different school, grade level, subject, or other activity to help the employee provide acceptable service. The plan may involve a variety of other activities, such as observing peers, assisting district resource persons, participating in inservice programs, or academic study.

A plan of assistance (see page 46 for a sample) may be used with both certificated and classified employees. Districts may prefer, however, to use a separate form with classified staff (see page 47 for a sample). Districts should be sure when using either, that the form is carefully reviewed and edited for local use.

An employee working under a plan of assistance may be unable to carry out the plan sufficiently to meet district performance standards. It may then be necessary to inform the employee that another plan of assistance may be necessary.

DEFINITIONS

The following definitions come from several sources, some are found in the statutes and others have been developed for use in this and similar publications. The source will be indicated where appropriate. The board should adopt these definitions.

Absenteeism: Deliberate or habitual absence.

Administrator: Any person who holds a valid Oregon Administrative Certificate and who is currently employed in a position defined as supervisory under ORS 243.650 - 243.782. (OAR 584-20-005(1))

Administrator: Includes any teacher the majority of whose employed time is devoted to service as a supervisor, principal, vice principal or director of a department or the equivalent in a fair dismissal district but shall not include the superintendent, deputy superintendent or assistant superintendent of any such district or any substitute or temporary teacher employed by such a district. (ORS 342.815(1))

Administrator: Includes all superintendents, assistant superintendents and principals in the public schools or education service districts. (ORS 342.120(1))

Certificated: Holding the proper certificate on April 1, to teach in the district identified education program, issued by Oregon's Teacher Standards and Practices Commission.

Classified Employee: Any person employed in a position which does not require a teaching certificate.

Competence: The ability to teach a subject or grade level based on recent teaching experience or educational attainments, or both, but not based solely on being certificated to teach a subject or grade level.

More Competence:

(a) Based on more recent subject teaching experience during the past three (3) years (math or English, etc.), or

(b) Based on more recent grade level teaching experience during the past three (3) years (elementary or secondary, etc.).

Competent: Discharging required duties as set forth in these rules. (OAR 584-20-005(2))

Corrective Discipline: May be involved with low productivity levels or poor attendance where there is a progression from an oral warning, then a written warning, next a suspension and finally an exclusion.

Development and Growth in the Teaching Profession: Improvement in skill, ability, knowledge of subject matter, technique and attitude in relation to the present assignment or to future positions within the profession.

Due Process: A personnel procedure that has the elements of notice and an opportunity to be heard plus the right to defend in an orderly manner.

Educator: Any person engaged in the instructional program, including teaching, administering and supervising, and who is required to be certificated. (OAR 584-20-005(3))

Ethical: Conforming to the professional standards of conduct set forth in these rules. (OAR 584-20-005(4))

Job Description: Written criteria that indicates the responsibilities including those that are unique to the specific employee's position; sometimes referred to as "position description."

Just Cause: A contractual term that means an employer must make a good faith determination of sufficient cause for discharge or discipline based on facts reasonably believed to be true and not any arbitrary, capricious or illegal reason.

Merit: Measurement of one teacher's ability and effectiveness against the ability and effectiveness of another teacher.

Multiple Observations: More than one occasion of incidental observation of the teacher in performance of duties and more than one occasion of formal observation of the teacher in planned instructional activities.

Performance Goals: Written criteria established at a preevaluation interview, based upon the job description and performance standards, that describe what the employee is expected to do to improve performance.

Performance Standards: Written criteria that identifies the indicators of quality relative to performing the responsibilities listed in the employee's job description.

Permanent Teacher: Any teacher who has been regularly employed by a fair dismissal district for a period of not less than three successive years, whether or not the district was such a district during all of such period, and who has been reelected by such district after the completion of such three-year period for the next succeeding school year. (ORS 342.815(5))

Probationary Teacher: Any teacher employed by a fair dismissal district who is not a permanent teacher. (ORS 342.815(6))

Program of Assistance: A written program established for the teacher at the postevaluation interview designed to assist a teacher who failed to meet one or more performance goals to attain the necessary development and growth in the teaching profession.

Recall: A procedure to call an employee back to work who was released during a reduction in staff within the last two years.

Rejection of a Specific Position: An employee has waived the right to recall by rejecting an offer of a position by the school district.

Release: A district school board staff reduction decision to remove a present staff employee from the future staff.

Seniority List: The oldest employee in points of service and competence for the position proceeding so on down the list of employees to the youngest in point of service based on the first day of actual service with the school district.

Service: Starts on the first working day with the district. (ORS 342.934(3)(c))

Substitute Teacher: Any teacher who is employed to take the place of a probationary or permanent teacher who is temporarily absent. (ORS 342.615(7))

Teacher:

(a) Any person who holds a teacher's certificate as provided in ORS 342.125 and who is employed to teach in the public schools of Oregon. (OAR 584-20-005(5))

(b) Any person who holds a teacher's certificate as provided in ORS 342.125 or who is otherwise authorized to teach in the public schools of this state and who is employed half time or more as an instructor or administrator. (ORS 342.815(8))

Teaching Experience: Employment on contract as probationary or permanent teacher.

Teaching Responsibilities: Duties assigned to the teacher, whether classroom instruction, counseling, curriculum development, or administrative duties.

Temporary Teacher: A teacher employed to fill a position designated as temporary or experimental or to fill a vacancy which occurs after the opening of school because of unanticipated enrollment or because of the death, disability, retirement, resignation, or dismissal of a permanent or probationary teacher. (ORS 342.815(9))

Written Criteria: Evaluative criteria including job descriptions, performance standards, performance goals and certification requirements, including standards of competent and ethical performance of professional duties.

SUGGESTED STANDARDS FOR COMPETENT AND ETHICAL EDUCATORS

The Oregon Legislature has given responsibility for "Standards for Competent and Ethical Performance of Oregon Educators" to the Teacher Standards and Practices Commission. Violations of these standards shall be admissible as evidence of gross neglect of duty or gross unfitness. (ORS 342.175(5))

Local school districts should adopt a statement of local standards. It is suggested that they be the following, which is the Commission's Standards OAR 584-20-010 to 035. *Items in italics have been added as* ***SAMPLES*** *of the kinds of statements a district may want to develop as indicators of performance.*

The Competent Educator (OAR 584-20-010)

The teacher or administrator demonstrates a commitment to: (a) recognize the worth and dignity of all persons, (b) encourage scholarship, (c) promote democratic citizenship, (d) raise educational standards and (e) use professional judgment.

REMEMBER THESE TSPC STANDARDS ARE SUGGESTIONS.

Curriculum and Instruction (OAR 584-20-015)

(1) The competent educator measures success by the progress of each student toward realization of personal potential as a worthy and effective citizen. The competent educator stimulates the spirit of inquiry, the acquisition of knowledge and understanding, and the thoughtful formulation of goals as they are appropriate for each individual.

(2) The competent teacher demonstrates:

(a) Use of state and district adopted curriculum and goals by:

1. *Explaining the relationship between instructional activities and the adopted district and course goals.*

2. *Following a planned course statement for each course taught.*

3. *Preparing lesson plans consistent with course goals.*

4. *Implementing learning activities and assessment procedures.*

REMEMBER THESE TSPC STANDARDS ARE SUGGESTIONS.

(b) Skill in setting instructional goals expressed as learning outcomes by:

1. *Showing skill in goal writing.*

2. *Developing appropriate group and individual instructional activities.*

3. *Determining the degree to which students reach goals.*

(c) Use of current subject matter appropriate to the individual needs of students by:

1. *Developing curriculum and setting goals within the ability of individual students.*

2. *Developing learning goals with students based on individual student needs.*

3. *Clearly differentiating learning goals based on individual student needs.*

(d) Use of students' growth and development patterns to adjust instruction to individual needs consistent with number of students and amount of time available by:

1. *Using knowledge of specific student needs in determining individual programs.*

2. *Recognizing individual needs and adapting to student growth during the year.*

(e) Skill in the selection and use of teaching techniques conducive to student learning by:

1. *Using evaluation materials to identify individual instructional needs.*

2. *Providing a variety of instructional procedures designed to meet individual student needs.*

3. *Utilizing appropriate instructional resources.*

REMEMBER THESE TSPC STANDARDS ARE SUGGESTIONS.

(3) The competent administrator demonstrates:

(a) Skill in assisting individual staff members to become more competent teachers by complying with state law, rules, and lawful and reasonable district policy and contracts by:

1. Carrying out assigned duties as specified in state laws and rules, and in district policies and procedures.

2. Informing staff, students and the public as to their rights and responsibilities.

3. Monitoring compliance with district policies and procedures.

(b) Knowledge of curriculum and instruction appropriate to assignment by:

1. Becoming familiar with the instructional programs of the district.

2. Assisting staff to meet district requirements and student needs.

(c) Skill in implementing instructional programs through adequate communication with staff by:

1. Including all assigned employees in a dissemination program of:

a. Districtwide department information.
b. Building/department information.
c. Other matters appropriate for distribution.

2. Using appropriate media.

3. Utilizing interpersonal skills in working with staff.

(d) Skill in identifying and initiating any needed change which helps each student toward realization of personal learning potential by:

1. Reviewing current practices with students, staff, parents and patrons.

2. Planning for desired changes based on review of current practices.

REMEMBER THESE TSPC STANDARDS ARE SUGGESTIONS.

Supervision and Evaluation (OAR 584-20-020)

(1) The competent educator is a student of human behavior and uses this knowledge to provide a climate that is conducive to learning and that respects the rights of all persons without discrimination. The competent educator assumes responsibility for the activities planned and conducted through the district's program, and assists colleagues to do the same. The competent educator gathers relevant information and uses it in the planning and evaluation of instructional activities.

(2) The competent teacher demonstrates:

(a) Ways to assess progress of individual students by:

1. Maintaining a record-keeping system which will include:

a. Pretest data on each goal.
b. Posttest data on each goal.
c. General comments.
d. Instructional progress.

2. Using goal-relevant instruments.

(b) Skill in the use of assessment data to assist individual student growth by:

1. Maintaining a plan for alleviating student learning weaknesses and strengthening/developing skills.

2. Appropriately interpreting individual student assessment data.

(c) Procedures for evaluating curriculum and instructional goals and practices by:

1. Monitoring student learning outcomes.

(d) Skill in the supervision of students by:

1. Interacting in a consistent manner.

2. Respecting students' individual rights.

3. Providing positive verbal and nonverbal feedback.

REMEMBER THESE TSPC STANDARDS ARE SUGGESTIONS.

(3) The competent administrator demonstrates:

(a) Skill in the use of assessment data to provide effective instructional programs by:

1. *Determining areas of greatest need in strengthening instructional programs to provide curriculum balance.*

2. *Determining what information is needed to provide effective instructional programs.*

3. *Comparing data to determine appropriate curriculum changes.*

4. *Deciding what information will be needed to evaluate programs once under way and applying that information for modifying or continuing the programs.*

(b) Skill in the implementation of the district's student evaluation programs by:

1. *Utilizing appropriate goal-setting and evaluation programs.*

2. *Utilizing objective as opposed to subjective criteria.*

3. *Utilizing appropriate means for reporting test information.*

4. *Complying with district policies, rules and regulations on the use of evaluation.*

(c) Skill in providing equal opportunity for all students and staff by:

1. *Showing knowledge of and compliance with relevant laws, rules, and policies.*

2. *Informing staff and students of relevant laws, rules, policies and building procedures.*

3. *Investigating complaints of unequal opportunity and assuring equal treatment.*

(d) Skill in the use of employee techniques appropriate to the assignment and according to well-established standards which insure due process for the staff being evaluated by:

1. *Following the district's evaluation process.*

REMEMBER THESE TSPC STANDARDS ARE SUGGESTIONS.

Management Skills (OAR 584-20-025)

(1) The competent educator is a person who understands students and is able to relate to them in constructive ways. The competent educator establishes and maintains good rapport. The competent educator maintains and uses records as required, and as needed to assist the growth of students.

(2) The competent teacher demonstrates skills in:

(a) Establishing and maintaining classroom management that is conducive to learning by:

1. Respecting student opinions.

2. Exhibiting positive verbal and nonverbal influence on students.

3. Providing an atmosphere in which students remain on task and are expected to reach course goals.

4. Providing information about and enforcement of conduct standards.

5. Regularly monitoring student learning procedures.

(b) Using and maintaining district property, equipment and materials appropriately by:

1. Demonstrating and encouraging respect for public property.

2. Instructing students in proper use of equipment and materials.

(c) Using and maintaining student records as required by district policies and procedures by:

1. Demonstrating the use of district policies regarding the use of student records.

(d) Using district and school business and financial procedures by:

1. Following prescribed procedures in using and recording district funds.

REMEMBER THESE TSPC STANDARDS ARE SUGGESTIONS.

(e) Using district lawful and reasonable rules and regulations by:

1. *Knowing building and district rules and regulations.*

2. *Observing the spirit and intent of rules and regulations of the school and district.*

3. *Exhibiting consistent application of rules and regulations.*

4. *Requiring student compliance with and enforcing school rules.*

(3) The competent administrator demonstrates:

(a) Skills in managing the school, its students, staff and programs as required by lawful and reasonable district policies, rules and regulations, state and federal laws and regulations, and other programs as assigned, and assures that staff is informed of these requirements by:

1. *Developing a management model.*

2. *Reviewing position descriptions with all staff members.*

3. *Developing and disseminating staff and student handbooks.*

4. *Monitoring policies, rules, regulations, laws, etc., and implementing requirements and appropriate changes.*

5. *Utilizing a communication system.*

(b) Skills in planning and staff utilization by:

1. *Developing a planning model.*

2. *Identifying and giving recognition to staff strengths and interests.*

3. *Utilizing staff resources.*

4. *Monitoring staff performance and student learning.*

REMEMBER THESE TSPC STANDARDS ARE SUGGESTIONS.

Human Relations and Communications (OAR 584-20-030)

(1) The competent educator works effectively with others--students, staff, parents and patrons. The competent educator is aware of the ways the community identifies with the school, as well as community needs and ways the school program is designed to meet these needs. The competent educator can communicate with knowledge, clarity and judgment about educational matters, the school and the needs of students.

(2) The competent teacher demonstrates:

(a) Willingness to be flexible in working cooperatively with others by:

1. Constructively managing professional differences.

2. Adjusting readily to emergency or changing conditions.

3. Carrying an appropriate share of extra assignments.

(b) Skill in communicating with students, staff, parents, and other patrons by:

1. Presenting clearly information in both oral and written form.

2. Conferring with parents regarding student instructional needs.

(3) The competent administrator demonstrates:

(a) Skill in helping students, staff, parents, and other patrons to learn about the school and its programs by:

1. Reporting accurately information about district programs and procedures.

2. Responding to community needs and concerns.

(b) Skill in communicating district and program goals to staff and public by:

1. Stating and interpreting district goals and programs.

2. Using designated channels to bring ideas, suggestions and questions from students, staff, and public to the attention of appropriate persons or groups.

REMEMBER THESE TSPC STANDARDS ARE SUGGESTIONS.

(c) Willingness to be flexible in cooperatively working with others by:

1. *Constructively managing professional differences.*

2. *Adjusting personal and staff activities to meet emergency and changing conditions.*

3. *Assuming an appropriate share of extra assignments.*

(d) Skill in reconciling conflicts by:

1. *Considering all sides of an issue and suggesting alternative solutions.*

2. *Leading individuals to analyze and resolve conflicts in a positive manner.*

The Ethical Educator (OAR 584-20-035)

The ethical educator is a person who accepts the requirements of membership in the teaching profession and acts at all times in ethical ways. In so doing the ethical educator considers the needs of the students, the district and the profession. (Note: *Statements as indicators of performance have not been suggested for the ethical educator.*)

(1) The ethical educator, in fulfilling obligations to the student, will:

(a) Keep the confidence entrusted in the profession as it relates to confidential information concerning a student and family;

(b) Refrain from exploiting professional relationships with any student for personal gain, or in support of persons or issues.

(2) The ethical educator, in fulfilling obligations to the district, will:

(a) Apply for, accept, offer, or assign a position of responsibility only on the basis of professional qualifications, and will adhere to the conditions of a contract or the terms of the appointment;

(b) Conduct professional business, including grievances, through established lawful and reasonable procedures;

(c) Strive for continued improvement and professional growth;

(d) Accept no gratuities or gifts of significance that could influence judgment in the exercise of professional duties.

REMEMBER THESE TSPC STANDARDS ARE SUGGESTIONS.

(3) The ethical educator, in fulfilling obligations to the profession, will:

(a) Maintain the dignity of the profession by respecting and obeying the law, exemplifying personal integrity and honesty.

(b) Extend equal treatment to all members of the profession in the exercise of their professional rights and responsibilities;

(c) Respond to requests for evaluation of colleagues and keep such information confidential as appropriate.

SUGGESTED SCHEDULES FOR EVALUATION ACTIVITIES

Certificated Employees

The following sequence of evaluation-related activities are suggested for local use.

By October 15:

1. Teachers should receive a copy of the position description, the performance standards and the evaluation form prior to the time school opens.

2. Evaluators should hold a preevaluation interview with each teacher to establish performance goals for the teacher based on the position description and performance standards.

3. First-year probationary teachers and temporary teachers should be observed at least one full classroom period, and this observation should be followed by a conference.

4. Second-year probationary teachers who have been evaluated less than satisfactory in any category on any previous written evaluation should be observed at least one full classroom period, and this observation should be followed by a conference.

5. Permanent teachers whose performance in the classroom seems to be less than satisfactory, should be observed at least one full classroom period, and this observation should be followed by a conference.

6. Observations and conferences should be documented on appropriate forms immediately following observations and conferences. Observation form and conference report should be signed by both parties and put in the teacher's personnel file in the school.

7. The district should have a plan ready when needed for "staff discipline" designed to assist teachers who are having difficulty. Assistance may be found for the development of such a plan in the Personnel Management Advisory Committee publication titled Constructive Staff Discipline 1981, (Oregon Department of Education).

By December 15:

1. First-year probationary teachers and temporary teachers should be observed again at least one full classroom period, and this observation should be followed by a conference. When possible, these teachers should be observed on several other occasions and at different times of the day.

2. Second- and third-year probationary teachers should be observed again at least one full classroom period, and this observation should be followed by a conference. When possible, these teachers should be observed on several other occasions and at different times of the day.

3. Permanent teachers whose performance in the classroom seems to be less than satisfactory should be observed again at least one full classroom period and this observation should be followed by a conference.

4. Observations and conferences should be documented and forms and reports signed as before.

By January 15:

1. Evaluators should hold a postevaluation interview with each teacher to discuss the result of the evaluations and to establish, if needed, a written program of assistance for improvement.

2. The first written evaluation based on written criteria must include the performance goals for the teacher, and should be signed by both parties and put in the teacher's personnel file in the district office. A copy of the completed form should be given to the teacher. Evaluator and appropriate supervisor should discuss less-than-satisfactory evaluations.

3. Teachers who disagree with any part of the written evaluation should be provided an opportunity to write a rebuttal, and their statement should be attached to the evaluation form and placed in the district personnel file.

By February 15:

1. Teachers whose performance has been less than satisfactory should have additional observations and conferences. If performance is still less than satisfactory, a supplementary evaluation form signed by both parties should be filed in the district office.

By March 1:

1. First- and second-year probationary teachers should be observed again at least one full classroom period, and this observation should be followed by a conference. Other observations and conferences, as needed, should be held prior to the second written evaluation.

2. Observations and conferences should be documented and forms and reports signed as before.

3. Written evaluations of all probationary teachers and permanent teachers who do not meet performance goals based on the position description and performance standards should be filed in the district office.

4. Notices of nonrenewal, if any, should be given to probationary teachers.*

*See ORS 342.835 and 342.865-915.

By June 15:

1. The evaluation form required by ORS 342.850(1)** should be completed for all teachers and filed along with any district forms in the district office.

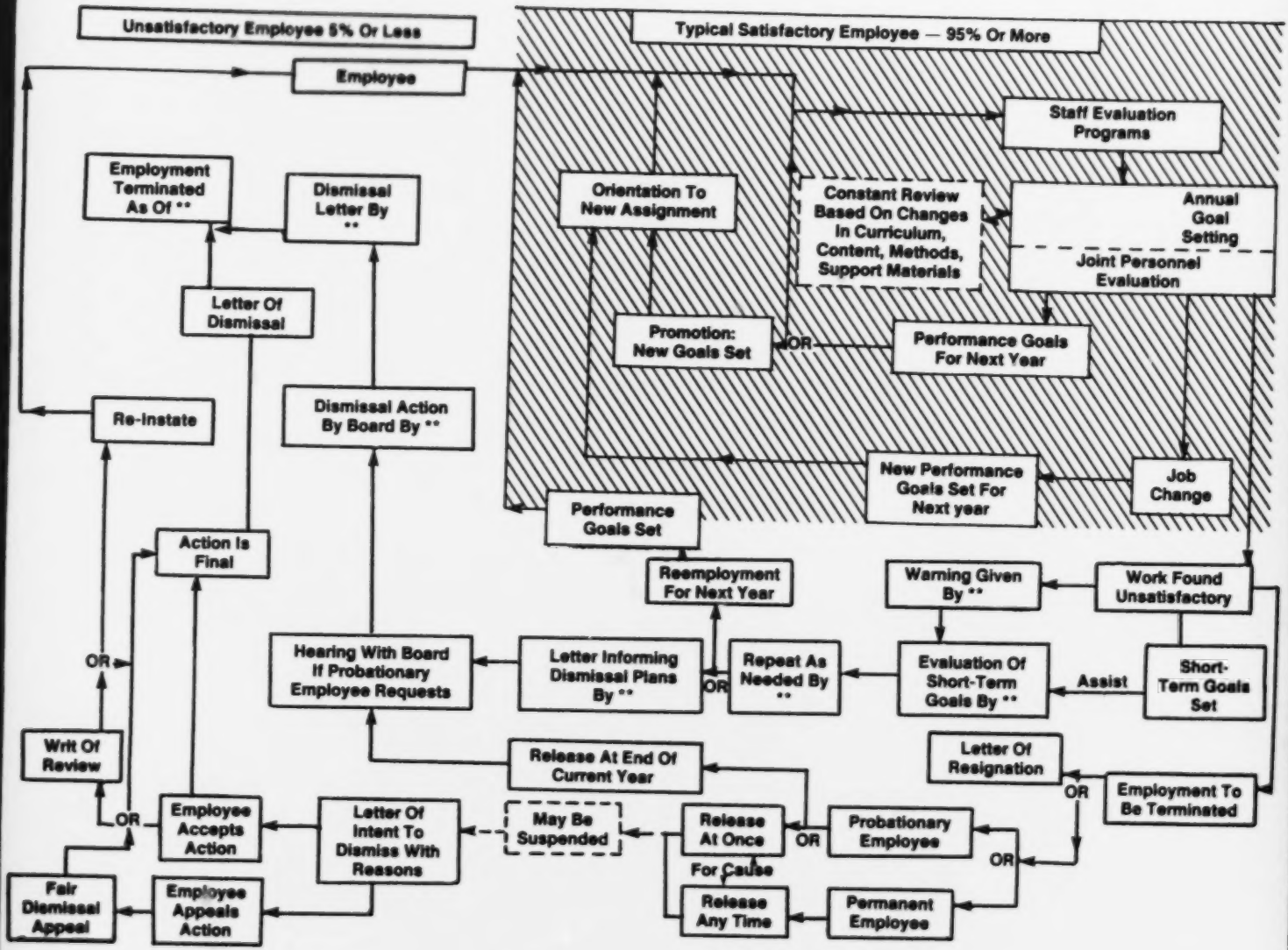
SUGGESTED SCHEDULE IN BRIEF

by Oct 15	Preevaluation interviews; observations and conferences
by Dec 15	Additional observations and conferences, as needed
by Jan 15	Postevaluation interviews
by Feb 15	Additional observations and conferences, as needed
by Mar 1	Recommendations for renewal or nonrenewal
by Jun 15	Form(s) filed in district office

A flow chart showing the sequence of events and the alternative steps that may be taken in the certificated staff evaluation process is on page 24. It should be noted that the shaded portion shows the activities as they apply to satisfactory employees, estimated to be about 95 percent of the teaching staff. The unshaded portion shows the more complex path through which alternative action takes place and this applies to only five percent of the staff.

**Form 581-1231 (Rev. 11/79) available from the Oregon Department of Education.

Chart



**Dates are filled by collective bargaining agreement or board action

Classified Employees

Procedures suggested on pages 30 to 32 also apply to the supervision and evaluation of classified staff.

Evaluation of classified staff should be carried out on a schedule and otherwise as necessary. Supervisors should promptly discuss results of these evaluations with employees and place reports in personnel files. Evaluations should be in writing on a standard form the district develops (see samples, pages 41, 44, 45). Both supervisor and employee should sign the evaluation. Provision should be made for the employee to respond to the report. That person's signature indicates only that the evaluation was read, not necessarily agreement.

Employee and supervisor together should annually write performance goals for the employee, based on the position description and performance standards. In the event of disagreement, supervisors should establish goals, noting the employee's disagreement, and provide for the implementation of the goals.

Supervisors and employees should determine at each checkpoint what progress has been made toward the goal. New goals may be set, the process being designed to assist the employee to improve performance.

By October 15:

1. Classified employees should receive a copy of the position description, the performance standards and the evaluation form when employed.

2. Evaluators should hold a preevaluation interview with each classified employee to establish performance goals for the employee based on the position description and performance standards.

3. Classified employees in a new or altered assignment should be observed at least once, and this observation should be followed by a conference.

4. Observations and conferences should be documented on appropriate forms immediately following observations and conferences. Observation form and conference report should be signed by both parties and put in the employee's personnel file in the school.

By December 15:

1. Classified employees in a new or altered assignment, and others as appropriate, should be observed as needed.

2. Observations and conferences should be documented and forms and reports signed as before.

3. The first written evaluation based on the written criteria which should include the performance goals for the employee should be put in the employee's personnel file in the district office. A copy of the completed form should be given to the employee. Evaluator and appropriate supervisor should discuss less-than-satisfactory evaluations.

By February 15:

1. Employees whose performance has been less than satisfactory should have additional observations and conferences. If performance is still less than satisfactory, a supplementary evaluation form signed by both parties should be filed in the district office.

By May 15:

1. Classified employees who are to perform services in the same or similar capacity during a subsequent academic year shall receive written notice of reasonable assurance of continued employment. (ORS 342.617)

By June 15:

1. A district form (see samples, pages 45, 46) should be completed for all classified employees, signed by both parties and filed, if this has not already been done.

SUGGESTED SCHEDULE IN BRIEF

by Oct 15	Preevaluation interviews; observations and conferences
by Dec 15	Additional observations and conferences, as needed
by Feb 15	Additional observations and conferences, as needed
by May 15	Notice of continued employment, as appropriate
by Jun 15	Form(s) filed in district office

Plan of Assistance (see also page 6)

If an employee's effectiveness is below the performance standards, districts may want to implement a plan of assistance. Such a plan should include an objective analysis of observable difficulties and a statement of immediate goals to overcome these difficulties. The plan should include a checkpoint schedule, and both employee and supervisor should sign it.

The plan may be reassignment, now or at a later date, to a different school or to other activity to help the employee provide acceptable service. The plan may involve a variety of activities such as observing peers, assisting district resource persons, participating in inservice programs, or academic study. (See PMAC--Constructive Staff Discipline 1981.)

A plan of assistance (see page 47 for a sample) may be used with both certificated and classified employees. Districts may prefer, however, to use a separate form with classified staff (see page 48 for a sample). Districts should be sure when using either that the form is carefully reviewed and edited for local use.

An employee working under a plan of assistance may be unable to carry out the plan sufficiently to meet district performance standards. It may then be necessary to inform the employee that a new plan of assistance is needed.

HEARING ON DEMOTION OR DISMISSAL OF DISTRICT EMPLOYEES

1. Certificated employees who are to be demoted or dismissed shall be informed in writing no later than April 1 of each year. This action shall be carried out as provided in the Fair Dismissal statutes, ORS 342.815 to 342.955.

2. Classified employees who are demoted or dismissed are entitled to a hearing before the school board if a written request is filed with the board within 15 days of the demotion or dismissal. (ORS 342.663)

3. A district that has financial or staffing problems may want to consider alternatives for staff assignment. (See PMAC Staffing Alternatives, September 1983, Oregon Department of Education.)

CHECKLIST

A suggested checklist for reviewing the personnel evaluation process is on the next page. It is recommended that districts use this or a similar list to determine that it has followed the various statutes and rules that apply to this required activity.

SAMPLE FORMS

The following pages present a number of forms that may be used to carry out the various procedures listed earlier. It should be noted that these models are not required, other than that provided by the state for teacher evaluation. Districts should consider their situation carefully and modify these models to best fit local needs and programs.

A SUGGESTED CHECKLIST
FOR REVIEWING THE PERSONNEL EVALUATION PROCESS

_____ 1. The District Board has adopted a plan of development for the evaluation process. (Documented. Minutes to show how!) (See pages 34-39.)

_____ 2. The Board has adopted rules to govern access to personnel files. (Employment Procedures, Personnel Files, 1980, pages 1-2.*)

_____ 3. The Board has adopted rules to specify the school officials designated to inspect personnel files. (Employment Procedures, Personnel Files, 1980, pages 2-3.*)

_____ 4. The Board has adopted rules on the Personnel Evaluation Process (General Rules). See pages 30-31.

_____ 5. The Board has adopted rules to document definitions of all major terms to be used in the process (first step in the process). See pages 8-10.

_____ 6. The evaluation process should serve one major purpose: "Improve the Quality of Work." See page 1.

_____ 7. The district job descriptions are made clear during the preevaluation interviews (indicates the responsibilities). (Employment Procedures, Position Descriptions, May 1979, page 27.*) See pages 35-36.

_____ 8. The district performance standards indicate a degree of performance of assigned work. (How well!) Refer to italics on pages 11-20.

_____ 9. The performance goals describe what the employee is expected to do to improve the quality of work. (What to do before the next interview!)

_____ 10. The district evaluation process uses multiple observations before the postevaluation interview. (Evaluation Guidelines, November 1979, pages 17-20.*) See pages 21-23.

_____ 11. The district has adopted rules to use the State Evaluation Form. See reverse side of Form, page 39.

_____ 12. The district has adopted a program of assistance for an employee that fails to meet the performance goals. See pages 6 and 26.

*A PMAC publication.

____ 13. The district has a plan to use a third party to assist the employee and supervisor when concern develops. (Hearings, 1980*; and Due Process Hearing Handbook, 1980, Oregon Department of Education.)

____ 14. The district has fair procedures (due process) for working with people. See pages 4-5.

____ 15. The District Board has adopted a plan of implementation for the evaluation process. (Documented. Minutes show when!) See pages 33-34.

*A PMAC publication.

SAMPLE RULE
(Not Required)
(ORS 342.850 and 332.107)

EMPLOYEE EVALUATION

A. ASSIGNED EMPLOYEES. Within twelve (12) school days after the beginning of each school year, the building principal(s) or appropriate supervisor(s) shall acquaint each employee under his/her supervision with the formal evaluation procedures and instruments and advise each employee as to the designated supervisor(s) who will observe and evaluate performance. The purpose of the orientation is to achieve mutual understanding of the evaluation system. No formal evaluation shall take place until such orientation has been completed.

A new employee or an employee reassigned after the beginning of the school term shall be notified by the appropriate supervisor(s) of the evaluation procedures in effect. Such notification shall be within two (2) weeks of the first day in the new assignment.

B. UNASSIGNED EMPLOYEES. A designated building principal(s) or appropriate supervisor(s) of an employee not assigned to a building shall be responsible for notification and evaluation of all such employees.

C. REQUIRED OBSERVATIONS.

1. New employees shall be formally observed at least three (3) times during the first year of employment, at least twice the first semester and at least once the second semester. There shall be at least a ten (10) school-day period between each formal observation.

2. Other employees shall be formally observed at least once each year. Such employees may request an additional formal observation by making a written request to the building principal prior to February 1 and such additional formal observation shall be made by the principal or designated supervisor.

D. FORMAL EVALUATION PROCEDURES. The building principal or appropriate supervisor shall evaluate each employee formally in writing. Such evaluations shall be based upon the evaluation procedures which were explained to them at the beginning of the school year. All formal observations shall be preannounced not more than two (2) weeks before the week of observation.

1. Preobservation Conference. A preobservation conference must be held between the appropriate supervisor and the employee at least three (3) days prior to the formal observation if requested by the employee.

2. Length. Each formal written evaluation shall be preceded by at least one (1) classroom observation of at least thirty (30) minutes, consecutively, unless emergencies arise which cause the observation to be a lesser amount of time.

3. Postformal Observation Procedure. Within seven (7) school days following a formal observation, a formal written evaluation of the observation shall be given to the employee and a copy placed in the employee's personnel file. The principal or other supervisor or the employee may request a conference to discuss the formal written evaluation and other matters, but such conference is not required unless requested. Both the evaluator and the employee shall sign the last page of the formal written evaluation and a copy shall be placed in the employee's personnel file. A copy signed by both parties shall be given to the employee. The employee's signature does not necessarily mean agreement with the evaluation, but rather, awareness of the content.

4. If a principal or other supervisor writes up an informal observation, it shall be dated and signed and a copy shall be placed in the employee's personnel file. A copy shall be given promptly to the employee.

5. Evaluation Summary. Before the 1st of March, an evaluation summary shall be prepared by the principal or other supervisor summarizing all observations to that time. Other summaries may be made before the end of the school year. A copy shall be given to the employee and a conference shall be held between the employee and the principal or other supervisor within seven (7) school days to discuss the evaluation summary and any other matters. Both parties shall sign the last page of the evaluation summary. A signed copy shall be given to the employee and a copy shall be placed in the employee's personnel file. The employee's signature does not necessarily mean agreement with the evaluation summary, but rather, awareness of the content.

E. PERSONNEL FILE REVIEW. Employees shall have the opportunity to review their personnel files, both at the building level and the central administration office, with the exception of confidential letters of recommendation and college and university credentials. Such review shall be conducted in the presence of the principal, superintendent, or a designee, and such review shall be during ordinary office hours and at a time when the employee is not required to be on duty. No material shall be removed from the file by the employee during such review. At the employee's request, a representative of the employee association may accompany the employee when the employee reviews his or her file.

F. RESPONSES. The employee shall have the right to respond to all materials contained in the employee's personnel file, such responses to be dated and signed, and a copy provided to the principal or immediate supervisor. Such responses shall be placed in the employee's personnel file.

PROPOSED POLICY RESOLUTIONS
TO CARRY OUT THE 1979 LEGISLATION ON EVALUATION

[342.850(2)]

Suggested policy for development of an evaluation process where there is no employee bargaining association.

Board Rule Number

Resolved, That the board consult with (2 or 3 teachers) selected by the teachers and with (one or more administrator(s), if any, not including the superintendent or assistant superintendent who are not administrators for this purpose) and develop an evaluation process.

Suggested policies for development of an evaluation process where there is an employee bargaining association.

Board Rule Number

Resolved, That the superintendent contact the (teachers' bargaining association) and obtain names of teachers belonging to and appointed by the (local bargaining organization) to consult with the board on an evaluation process.

Resolved, That the board consult with duly appointed members of the teachers bargaining organization and with (one or more administrators, if any, not including the superintendent or assistant superintendent who are not administrators for this purpose) and such others as the board may deem necessary in development of an evaluation process.

District Board Rule Number

Resolved, That the Superintendent implement effective (date)_____ the personnel evaluation process to improve the quality of work that was developed in consultation with teachers and administrators that includes:

(a) the establishment of job descriptions and performance standards for each employee,

(b) a preevaluation interview which establishes performance goals for the employee,

(c) an evaluation based on written criteria,

(d) a postevaluation interview in which the results of the evaluation is discussed with the employee, and

(e) a written program of assistance for improvement, if needed.

(A sample of some of the content of the Job Description and Performance Standards that will be needed in recruitment, selection, supervision and evaluation.)

JOB DESCRIPTION

Fourth Grade	Mary Smith
Teaching Position	Teacher's Name
Reports to: John Jones	West Elementary
Principal's Name	Building

Definition: A teacher actively engaged in teaching fourth grade children, a job that requires an Oregon elementary teaching certificate as required by the TSPC (Teacher Standards and Practices Commission).

Performance Responsibilities (What the teacher is expected to perform.):

1. Instructs all students in a fourth (4th) grade classroom in language arts including reading and writing, mathematics, science, social studies, music, physical education, art and health education.
2. Maintaining a planned program for basic skills of reading, writing and mathematics for each student.
3. Identifies the levels of knowledge and skills in reading, writing and mathematics expected of each student at the completion of the school year.
4. Classroom/building management
5. Others

Performance Standards (How well is the teacher expected to perform?):

1. Demonstrates knowledge and use of state- and district-adopted curriculum.
2. Demonstrates skill in setting instructional goals expressed as learning outcomes.
3. Demonstrates use of current subject matter appropriate to the individual needs of students.
4. Others

Very good quality
Good quality
Uncertain
Poor quality
Very poor quality

You may use this set of suggested subjective responses for each standard after the observations have been made for each teacher that needs to improve (probably less than 10%).

(A sample of some of the content of Performance Goals.)

Performance Goals (What is expected to happen to improve performance before the next interview?)

1. Improve the prepared lesson plans by indicating some individualized instruction plans.

2. Develop and use procedures to help recognize student instructional needs.

3. Make a list of successes for some of your students to report to the parents at the next conference.

4. Others.

District Policy No.

HEARING RIGHTS

A Hearing may be required in any of the following instances. An employee requesting a hearing shall have an opportunity to have a hearing prior to any final action resulting in discipline, demotion, nonrenewal or dismissal.

1. A classified employee who files a request for a hearing within 15 days of dismissal or demotion under ORS 342.663.
2. Employee grievance (where the grievance procedure so requires).
3. Probationary teachers who are being dismissed during the contract period.
4. Probationary teachers who are not renewed at the end of the contract period and who meet any one or more of the following:
   a) If the teacher has a clearly implied promise of continued employment;
   b) If the teacher has an expectancy of reemployment;
   c) If the teacher is denied renewal for a reason which would damage his/her standing or association within the community;
   d) If the action of the school administration imposes a stigma or other disability foreclosing the teacher's freedom to take advantage of other teaching opportunities.
5. Probationary teachers or administrators not entitled to a hearing under (3) or (4) but who request a hearing.

INFORMAL MEETING

A meeting with the Board may be given the employee in the following instances:

1. Meetings to commend or recognize an employee's outstanding performance or service to the district or community.
2. Others

FAIR EMPLOYMENT

Administrative procedures for activities prior to hearings to discipline, demote, nonrenew, or dismiss an employee, shall include, wherever reasonable, a NEAT procedure: N-notice; E-explanation; A-assistance; and T-time:

1. Notice - an early notice from the supervisor providing an opportunity for the employee to be aware of specific deficiencies.
2. Explanation - a statement of the reasons for the action by the supervisor.
3. Assistance - information from the supervisor as to how he will assist the employee to improve.
4. Time - time for the employee to make a change of behavior.

5. The Board shall remain unbiased and will not become involved in administrative decisions as to discipline, demotion, nonrenewal or dismissal of employee prior to a recommendation from the Chief Administrative Office (superintendent or principal).
6. The Administrative Officer of the district shall be responsible for implementing all Board policies and administrative processes relating to discipline, demotion, nonrenewal or dismissal of employees.

These are suggested policy statements. School boards should amend or otherwise alter the content to meet local conditions prior to possible approval.

ah/0987d
061886

_____ School District No. _____

_____ Oregon

TEACHER EVALUATION

Name _____ Employe Status _____

Assignment _____ School _____

General Instructions: This evaluation is based on the individual's performance goals, job description, and performance standards. Use the reverse side or additional pages as needed.

1. In what ways has the teacher met, failed to meet, or exceeded the performance standards, performance goals and teaching responsibilities?

2. In what areas has the teacher shown development and growth in the teaching profession?

3. In what specific areas does the teacher need to demonstrate additional development and growth?

4. Supervisor's recommendations:

   ☐ Continuation of Employment

   ☐ Termination of Employment

   ☐ Other _____

   Comments:

5. Teacher's response, if desired, as provided by law. [See reverse side for ORS 342.850(6)]

6. The following attachments are a part of this report:

This is to certify that we have read and discussed the above report.

Teacher's Signature	Date	Supervisor's Signature	Date

Oregon Department of Education
Form 581-1231 (Rev. 11/79)
Effective 7/1/80

342.850. (1) The district superintendent of every school district, including superintendents of education service districts, shall cause to have made at least annually but with multiple observations an evaluation of performance for each probationary teacher employed by the district and at least biennially for any other teacher. The purpose of the evaluation is to allow the teacher and the district to determine the teacher's development and growth in the teaching profession and to evaluate the performance of the teaching responsibilities. A form for teacher evaluation shall be prescribed by the State Board of Education and completed pursuant to rules adopted by the district school board.

(2) (a) The district school board shall develop an evaluation process in consultation with school administrators and with teachers. If the district's teachers are represented by a local bargaining organization, the board shall consult with teachers belonging to and appointed by the local bargaining organization in the consultation required by this paragraph.

(b) The district school board shall implement the evaluation process that includes:

(A) The establishment of job descriptions and performance standards which include but are not limited to items included in the job description;

(B) A preevaluation interview which includes but is not limited to the establishment of performance goals for the teacher, based on the job description and performance standards;

(C) An evaluation based on written criteria which include the performance goals; and

(D) A post-evaluation interview in which (i) the results of the evaluation are discussed with the teacher and (ii) a written program of assistance for improvement, if needed, is established.

(c) Nothing in this subsection is intended to prohibit a district from consulting with any other individuals.

(3) Except in those districts having an average daily membership, as defined in ORS 327.006, of fewer than 200 students, the person or persons making the evaluations must hold teaching certificates. The evaluation shall be signed by the school official who supervises the teacher and by the teacher. A copy of the evaluation shall be delivered to the teacher.

(4) The evaluation reports shall be maintained in the personnel files of the district.

(5) The evaluation report shall be placed in the teacher's personnel file only after reasonable notice to the teacher.

(6) A teacher may make a written statement relating to any evaluation, reprimand, charge, action or any matter placed in the teacher's personnel file and such teacher's statement shall be placed in the personnel file.

(7) The personnel file shall be open for inspection by the teacher, the teacher's designees and the district school board and its designees. District school boards shall adopt rules governing access to personnel files, including rules specifying whom school officials may designate to inspect personnel files.

PERSONNEL PROGRESS AND PERFORMANCE EVALUATION

_____SCHOOL DISTRICT

_____, Oregon

Employe_____ School_____

Probationary: 1st Year_____

2nd Year_____

3rd Year_____

Permanent: Years in District_____ Subject or Grade_____

Number of Observations and Follow-up Conferences_____

Performance Goals Obtained:

Observable Data:

Agreed-upon Follow-up Activity:

SAMPLE

_____ _____ _____

Employe's Signature (does not necessarily mean agreement but indicates the report has been read and discussed)

Supervisor's Signature

Date

EMPLOYE EVALUATION REPORT-A

Date_____

Name_____ Dept. or School_____

Address_____ Telephone_____

Rating: 1-Outstanding; 2-Satisfactory; 3-Needs Improvement; 4-Unsatisfactory

1 2 3 4

Quality of Work_____

Quantity of Work_____

Personal Appearance, Neatness and Habits_____

Health, regularly at work, physically strong_____

Dependability_____

Punctual, on time_____

Cooperates, works well with others_____

Follows instructions, seldom makes errors_____

Accepts suggestions willingly and cheerfully_____

Knowledge of work_____

Often sees and does extra work without being told_____

Participates in professional development (instructional)_____

Loyal to school system and fellow employes_____

Industrious, does not shirk_____

Takes good care of equipment and supplies_____

Accepts and completes work assignments_____

Give detailed explanation of any items checked in Column 4; indicate action employe must take to improve performance in each case.

COMMENTS:

_____ _____

Employe's Signature Supervisor's Signature

_____

Date Signed

Signatures indicate only that the employe and supervisor have discussed the evaluation.

SAMPLE

EMPLOYE EVALUATION REPORT -B

Employe Name	Position	Location

Section 1

1 Unsatisfactory	2 Needs to Improve	3 Meets Expectations	4 Exceeds Expectations	Does not apply	FACTOR CHECK LIST
					Quality of work
					Quantity of work
					Knowledge of work
					Punctuality and attendance
					Compliance with policies
					Safety practices
					Operation & care of equipment
					Judgment
					Initiative
					Dependability
					Public relations
					Staff relations
					Grooming and dress
					Professional development
					Additional factors

Section 2 For Supervisors

						Planning and organizing
						Scheduling & coordinating
						Training & instructing
						Productivity
						Evaluating others
						Judgment and decisions
						Leadership
						Additional factors

Section 3

Specific Job Strengths

Section 4 Weaknesses Requiring Improvement
(Explanation of checks in Column No. 1)

Section 5 Evaluator's Recommendation

___ Continue employment with advance in salary

___ Probation continue

___ Terminate employment

This is to certify that we have read and discussed the above report.

Employe _____ Evaluator _____

Date _____

The employe is invited to make any written comments regarding this evaluation. These written comments will be attached to and accompany this evaluation form.

White Copy – Personnel Office
Yellow Copy – Principal
Pink Copy – Employe

SAMPLE

EMPLOYE EVALUATION REPORT-C

EMPLOYE NAME	SCHOOL OR LOCATION	POSITION TITLE

Dates of Evaluation Period: _____ to _____

Employe Status
Probation ☐
Part-Time ☐
Regular ☐

If Unscheduled Report
Check Here ☐

Position Responsibility
_____

Does the employe adequately guard confidential information? _____ YES _____ NO

SECTION I

FACTOR CHECK LIST

Evaluator Must Check Each Factor in the Appropriate Column

4 Exceeds Expectation	3 Meets Expectation	2 Needs to improve	1 Unsatisfactory	Does Not Apply	
					PERFORMANCE ABILITIES
					Quality of work
					Knowledge of work
					Operation and care of equipment
					Typing Skills
					Shorthand – Machine transcription
					PERSONAL QUALITIES
					Attendance and Punctuality
					Appearance
					Public Relations
					Pupil Relations
					Staff Relations
					OTHER QUALITIES
					Compliance with rules
					Safety practices
					Adaptability
					Initiative
					Dependability

SECTION II — **FOR EMPLOYEES WHO SUPERVISE OTHERS**

					Planning and Organizing
					Scheduling and Coordinating
					Training and Instructing
					Productivity
					Evaluating Others
					Judgment and Decisions
					Leadership
					Additional Factors

Checks in column (1) must be explained in SECTION V.

SECTION III

Record job strengths and superior performance incidents.

SECTION IV

Record progress achieved in attaining previously set goals for improved work performance.

SECTION V

Record specific work performance deficiencies of job behavior requiring improvement or correction.

SECTION VI

Record specific goals of improvement to be undertaken during next evaluation period.

SAMPLE

EMPLOYE EVALUATION REPORT - D

SECTION VII Summary Evaluation and Status Recommendation

CHECK APPROPRIATE BOX

Exceeds Expectation ☐ Meets Expectation ☐ Requires Improvement ☐ Unsatisfactory ☐ Termination Recommended ☐	Comments:

Supervisor's Signature | Position | Date

EMPLOYE: I certify that this report has been discussed with me. I understand my signature does not necessarily indicate agreement.

Employe's Signature | Date

SAMPLE

THESE FACTOR DEFINITIONS PERTAIN TO ITEMS ON PAGE 1

FACTOR DEFINITION
Refers to the Efficient Completion of Assigned Job Tasks

QUALITY OF WORK:
With accuracy and with dependability.

KNOWLEDGE OF WORK:
The understanding of specific job requirements necessary for satisfactory job performance.

OPERATION AND CARE OF EQUIPMENT:
Refers to knowledge of and effort made to properly utilize materials for their most efficient use.

SAFETY PRACTICES:
Refers to the attempt to carry out job requirements considering the safety of self and others: participating in required safety programs. COMPLETE WHEN APPLICABLE.

ATTENDANCE:
Faithful adherence to hours and days of assigned work.

APPEARANCE:
Appropriateness of dress on the job.

PUBLIC RELATIONS:
Courteous and helpful attention given to other people and an awareness of representing a public service organization.

PUPIL RELATIONS:
Satisfactory relationship with students while on the job.

STAFF RELATIONS:
Maintaining a satisfactory working relationship with other employes and demonstrating a willingness to work within a group approach to achieve efficient operation.

ADAPTABILITY:
The ability to adjust without difficulty to new and changing conditions.

INITIATIVE:
The effort made to attain prescribed goals and respond with minimum direction to new demands and a willingness to accept responsibility or take action not required by job description.

DEPENDABILITY:
The ability to do required jobs well with a minimum of supervision.

EMPLOYE EVALUATION REPORT - E

For Classified Personnel

Employe Name | School or Location | Location No.

Employe Status
Probation ☐
Part-Time ☐
Regular ☐

If Unscheduled Report
Check Here ☐

Position Title _____ Range _____
Position Code _____ Step _____
Hours Per Day _____ Months Per Year _____

SECTION 1

FACTOR CHECK LIST

Evaluator Must Check Each Factor in the Appropriate Column

	A Not Satisfactory	B Requires Improvement	C Meets Standards	D Exceeds Standards	E Does Not Apply
1. Observation of Work Hours					
2. Attendance					
3. Grooming and Dress					
4. Compliance with Rules					
5. Safety Practices					
6. Public Relations					
7. Pupil Relations					
8. Employe Relations					
9. Knowledge of Work					
10. Work Judgment					
11. Planning and Organizing					
12. Job Skill Level					
13. Quality of Work					
14. Volume of Acceptable Work					
15. Meeting Deadlines					
16. Accepts Responsibility					
17. Accepts Direction					
18. Accepts Change					
19. Effectiveness Under Stress					
20. Appearance of Work Station					
21. Operation & Care of Equip.					
22. Work Coordination					
23. Initiative					
24. Additional Factors					
25.					
26.					
27.					
28.					
29.					
30.					

SECTION 1A

FOR EMPLOYES who SUPERVISE OTHERS

31. Planning & Organizing					
32. Scheduling & Coordinating					
33. Training & Instructing					
34. Productivity					
35. Evaluating Subordinates					
36. Judgments & Decisions					
37. Leadership					
38. Operational Economy					
39. Supervisory Control					
40. (Additional Factors)					
41.					
42.					
43.					
44.					
45.					

Checks in Col. (s) must be explained in Section 6

USE INK OR TYPEWRITER IN COMPLETING THIS FORM

SECTION 2 Record job strengths & superior performance incidents

SECTION 3 Record progress achieved in attaining previously set goals for improved work performance

SECTION 4 Record specific goals or improvement to be undertaken during next evaluation period.

SECTION 5 Record specific work performance deficiencies or job behavior requiring improvement or correction (Col. A)

SECTION 6 SUMMARY EVALUATION & STATUS RECOMMENDATIONS

Check Appropriate Boxes

Not Satisfactory ☐ Requires Improvement ☐ Effective Meets Standards ☐ Exceeds Standards ☐

Termination ☐

Comments:

Evaluator's Signature / Position / Date

EMPLOYE: I certify that this report has been discussed with me. I understand my signature does not necessarily indicate agreement.

Comment: _____

Employe's Signature Date

SAMPLE

PLAN OF ASSISTANCE

Certificated _____ _____School District

Classified _____ _____, Oregon

_____ _____
Employe Job Classification

It has been determined that your performance is below acceptable standards and that you need assistance.

You and I should study the deficient performance and plan a corrective program to include:

Performance to be improved

Plan to bring about this improvement (specific statements of things to be done)

(1) What is to be done:

(2) When is it to be done:

Monitoring activities

(1) Who is to monitor:

(2) When will monitoring occur:

Others (be specific)

The above will be accomplished or noticeable improvement achieved on or before _____, by which time we will have a review conference. We may at that time agree that improvement is satisfactory, or we may wish to revise performance goals.

SAMPLE

_____ _____
Employe's Signature Supervisor's Signature
(does not necessarily mean agreement but indicates the report has been read and discussed)

Copies: Employe
Supervisor
Employe File

_____ _____
Date Date

PLAN OF ASSISTANCE
(classified only)

Employe_____ Job Classification_____

School_____

Supervisor_____

Supervisor's statement of the problem:

Employe's statement of the problem:

Desired behavior:

Steps employe should take to arrive at desired behavior:

Steps supervisor should take to arrive at desired behavior:

Timeline for next evaluation:

SAMPLE

_____ _____
Employe's Signature Supervisor's Signature
(does not necessarily mean agreement but indicates the report has been read and discussed)

Copies: Employe
Supervisor
Employe File

_____ _____
Date Date